



# **Task Order Request for Proposal (TORFP) Process for Agency Representatives**

**Stacia Cropper**

DBM OIT Director, Strategic Planning

# Agenda

- Steps of the TORFP Process
- Q&A

## Steps in the TORFP Process

- Step 1 – Write the TORFP
- Step 2 – Review the TORFP
- Step 3 – Release the TORFP
- Step 4 – Conduct the Pre-Proposal Conference
- Step 5 – Evaluate Proposals
- Step 6 – Make the Award Recommendation
- Step 7 – Process the Award
- Step 8 – Communication
- Step 9 – Post Award Task Order Management

# Step 1 - Write the TORFP

- The Agency should
  - Include OIT early in the process to offer guidance on developing a solid Scope of Work (SOW)
  - Use the TORFP template on the CATS web site
    - OIT will work with the agencies to develop service-specific templates for future use
  - Ask the OIT Procurement Liaison Office (PLO) for help with any questions about using the template
  - Thoroughly read, edit, re-read, edit and re-read the TORFP
  - Submit draft final TORFP to OIT PLO for review

## Step 2 - Review the TORFP - OIT

- The Procurement Liaison Office (PLO)
  - Single point of contact for TORFP activity
  - Manages all communication with the Agency regarding a TORFP, including PMO review
  - Ensures inclusion of all relevant COMAR & Master Contract elements
  - Ensures that the SOW is written to allow for unrestricted competition
  - Confirms appropriate MBE goal
  - Confirms appropriate Functional Area designation
  - Reviews potential for SBR-only release
  - Ensures continuity throughout the TORFP

## Step 2 - Review the TORFP (cont.)

- The Project Management Office (PMO)
  - Conducts a technical review of the SOW
    - Project management
    - Quantifiable deliverables
  - Ensures that the SOW is written to allow for unrestricted competition
  - Provides suggested revisions to the PLO
    - PLO combines all OIT comments into one response to the Requesting Agency)

## Step 3 - Release the TORFP

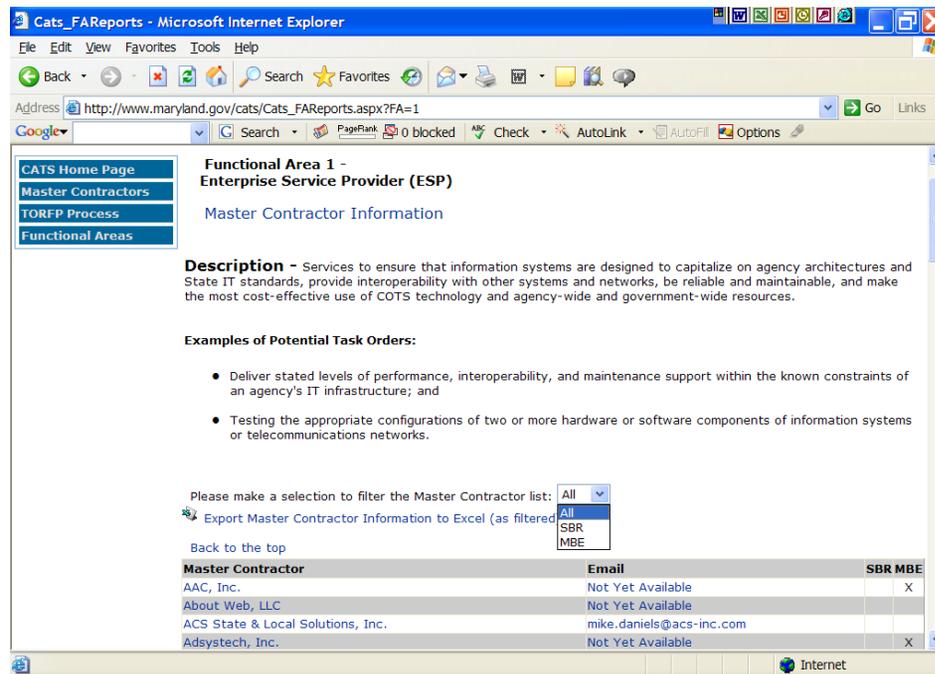
- Agency releases the TORFP via email to the Master Contractors in the designated Functional Area.
  - If the TORFP is designated as SBR-only, the agency will release it only to the SBR Master Contractors in the designated Functional Area.
  - Otherwise, the agency will release the TORFP to the full Master Contractor list in the designated Functional Area

# Step 3 - Release the TORFP (cont.)

The CATS web site provides export functionality for this purpose.

[www.maryland.gov](http://www.maryland.gov)

keyword: CATS



Cats\_FAReports - Microsoft Internet Explorer

Address: [http://www.maryland.gov/cats/Cats\\_FAReports.aspx?FA=1](http://www.maryland.gov/cats/Cats_FAReports.aspx?FA=1)

Navigation: CATS Home Page, Master Contractors, TORFP Process, Functional Areas

**Functional Area 1 - Enterprise Service Provider (ESP)**

Master Contractor Information

**Description** - Services to ensure that information systems are designed to capitalize on agency architectures and State IT standards, provide interoperability with other systems and networks, be reliable and maintainable, and make the most cost-effective use of COTS technology and agency-wide and government-wide resources.

**Examples of Potential Task Orders:**

- Deliver stated levels of performance, interoperability, and maintenance support within the known constraints of an agency's IT infrastructure; and
- Testing the appropriate configurations of two or more hardware or software components of information systems or telecommunications networks.

Please make a selection to filter the Master Contractor list:

[Back to the top](#)

Master Contractor	Email	SBR	MBE
AAC, Inc.	Not Yet Available		X
About Web, LLC	Not Yet Available		
ACS State & Local Solutions, Inc.	mike.daniels@acs-inc.com		
Adsystem, Inc.	Not Yet Available		X

## Step 3 - Release the TORFP (cont.)

Agency posts release information on the CATS web site (to be functional late April). In the interim, OIT will post on behalf of the agencies.

TORFP Status - <span style="color: red;">OPEN</span>					
Date Released	Proposal Due Date	TO Requesting Agency	Functional Area	Task Order Title	TORFP
[date mailed to MCs in FA]	[as stated on the Key Info Page]	[agency that released TORFP]	[FA]	[task order title/name]	[link to .pdf version of the TORFP]
TORFP Status – <span style="color: blue;">UNDER EVALUATION</span>					
Date Released	Proposal Due Date	TO Requesting Agency	Functional Area	Task Order Title	TORFP
[date mailed to MCs in FA]	[as stated on the Key Info Page]	[agency that released TORFP]	[FA]	[task order title/name]	[link to .pdf version of the TORFP]
TORFP Status - <span style="color: green;">AWARDED</span>					
Functional Area	TO Requesting Agency	Date Awarded	Master Contractor Selected	TORFP	Task Order Agreement
[FA]	[agency that released TORFP]	[date of TO Agreement]	[TO Contractor]	[link to .pdf version of the TORFP]	[link to .pdf version of the TO Agreement]

## Step 4 - Conduct the Pre-Proposal Conference and Respond to Questions

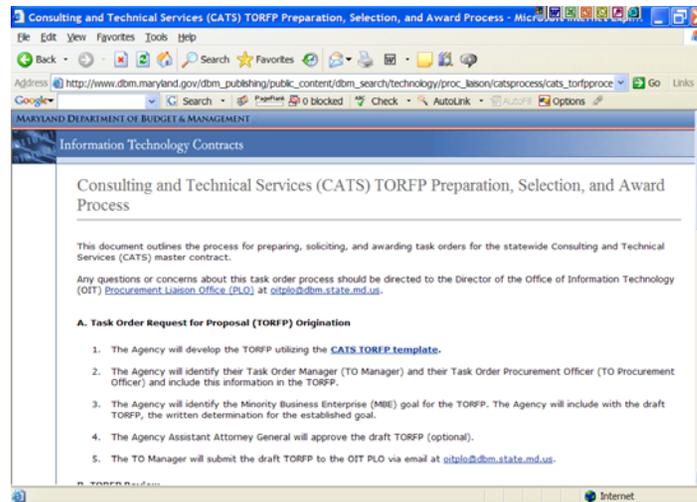
- The Agency
  - Conducts a pre-proposal conference as designated in the TORFP
  - Responds to Master Contractor questions
  - Releases any amendments necessary

## Step 5 - Receive Proposals and Conduct Evaluation

- The Agency
  - Receives all of the proposals in response to the TORFP
  - Posts the TORFP as Under Evaluation on the CATS web site
  - Evaluates the proposals in accordance with TORFP criteria
  - Ensures that all proposals meet the requirements of both the Master Contract and the TORFP
  - Conducts oral presentations, when appropriate
  - Requests BAFOs, when appropriate

## Step 6 - Make Award Recommendation

- Agency submits to OIT PLO an award package as specified in the TORFP Procedures



- OIT PLO reviews the award package, resolves discrepancies and gives the agency the OK to award

## Step 7 - Process the Award

- The Agency
  - Submits a purchase order release in ADPICS for OIT PLO approval
  - Executes a Task Order Agreement with the recommended Task Order Contractor
  - Issues a Notice to Proceed
  - Notifies unsuccessful Master Contractors of award and offers debriefings
  - Posts award information on the CATS web site
  - Provides OIT PLO copies of all documents as specified in the TORFP procedures

## Step 8 - Communication

- Once awarded, all communication about a task order is between the Agency and the Task Order Contractor
- Should the Agency need assistance or have any questions or concerns, the OIT PLO will weigh in, as needed

## Step 9 - TO Management

- The agency is responsible for management of the TO Agreement, including
  - Deliverable and invoice review and acceptance as stated in the Master Contract and the TORFP.
  - Monitoring and reporting MBE compliance
  - Auditing invoices to ensure that the State is paying the prices for which it contracted.
  - Notifying OIT PLO of any persistent problems with the TO Contractor.

**Questions?**